



Program Support and Administration

Programs

Program Support is an addition to CMS as of version 3.0 and allows for Diocese to use CMS as a platform from which they can connect to external workflows or data collections. It is designed to allow broad diocese level or even unique conference specific plug in data-related workflow to accommodate unique and specific needs. This means CMS can collect information from the client record and, depending on the program in question, potentially additionally collect additional data from the caseworkers or simply push it forward to other roles who will then perform specific functions related to these Special Works-like entities. For example, if a Diocese operates a pharmacy or a mattress program, caseworkers will be able to easily push client information to those programs as a request - allowing individuals tasked with managing those vincentian efforts to perform predefined tasks.

As an illustration, a Diocese might offer a job training program - and this program might be made available to all conferences within a particular part of the city. Caseworkers working with individual whom they assess might benefit from this program can refer them to the program with a couple simple clicks - and the details related to this individual will be forwarded to the program worker responsible for managing the training session. They can then contact the individual, host the training session, and even record the attendance - which will show up in the client record in the future.

More complex programs could involve delivery of mattresses or even managing the federal guidelines related to qualification for EFSP grant dollars (collecting landlord details etc - things that are not currently within the CMS workflow).

This is a plug in architecture which allows Diocese to bring unique and custom scenarios to the table. If they have a grant from the United Way to assist people with particular issues and qualifications, then these processes can be mapped out, new screens built, and these new vincentian functions made available to your local conferences.

In the 3.0 release the primary example of program support is an enhancement and replacement for assigning and tracking Holiday Program efforts.

Referring a Household to the Holiday Program

Caseworkers will simply press the [Vincentian Programs] ad select the Holiday Programs from the Program Grid list. From there they can refer the household to whichever holiday program they wish.

Configuring Holiday Programs

Each conference will conduct their holiday programs differently. Conferences may work with other local groups for Thanksgiving but do their own thing for Christmas. The first step is for conference treasurers to configure the holiday programs for their own conferences.

By opening the Vincentian Programs folder in the task pane, treasurers select the holiday program they wish to configure and press the [Configuration] button.

Christmas Configuration for South

The following is the date of Christmas this year. If this date is incorrect, please contact support.

Christmas

The actual giving/delivery of gifts/assistance to the clients usually does not occur on the holiday date itself. The following date is being used to approximate when this event happens this year.

Gift Giving Event *

For the purposes of keeping track of the clients referred to the program each year, we approximate a date for when the process of selecting clients and preparing gifts starts.

Gift Process Start *

Last year's dates for these milestones:

Gift Giving - Last Year *

For the purposes of keeping track of the clients referred to the program each year, we approximate a date for when the process of selecting clients and preparing gifts starts.

Gift Process - Last Year *

Each year, the Gift Process Start date is automatically determined as a certain number of days before the holiday date itself. The diocese provides a default for this number, but you can modify it below for your conference specifically.

Days Before This is the default provided by the diocese.

Modify Provide a different number, or leave blank to use diocese default.

The following number of days is likewise used to initialize the date for the gift giving event. Again, the diocese provides a default, but you can specify a different number for your conference.

Days Before This is the default provided by the diocese.

Modify Provide a different number, or leave blank to use diocese default.

Setting the Timing of the Event

These dates and options are inherited from the diocese configuration of the holiday - but conferences have the ability here to adjust them to fit their specific needs. Here we allow conferences to adjust when they deliver the assistance relative to the date of the actual holiday.

The primary goal of this is to capture when referrals that might occur after the conference's annual effort transpires but prior to the actual date of the holiday - so that those referred to the program in that window are not lost next year when the event comes around again.

Gift Giving Event allows a conference to set a specific date for when the event is scheduled to transpire this year. Gift Process Start allows the ‘window to open’ for when record keeping related to the actual event this year will start. It represents when those who’re referred to program for that year will likely end up in lists for folks to collect gifts or food and schedule delivery etc.

Referral Status

Clicking Search will allow the treasurer to search this particular holiday program subtype for individuals based on the status of the referral. There are 4 different statuses related to the referrals to consider.

- Submitted - Any referral that comes prior to the end of this year’s holiday program window is tagged as ‘Submitted’. This is a simple default state for anyone that’s been advanced to the holiday event.
- No Value - Once the record keeping date starts prior to the holiday event - all holiday referrals that have the status ‘Submitted’ will have their status changed to ‘No Value’ This is now the list of folks who are, in theory, going to end up getting something for the holiday.
- Gift Received - When a treasurer goes down the list and records what assistance was provided through the holiday program, the referral status will now switch to ‘Gift Received’
- No Gift - Is used to denote that this household did not receive assistance during the holiday even though they had been on the list. This could be for any number of reasons.

Search

This allows the treasurer to manage the list of those referred to the conference program - whether that’s for the purpose of eliminating duplicates, editing details, or recording post event assistance that was rendered to the household.

Thanksgiving at Conference South

Submitted
 No Value
 Gift Received
 No Gift

Angel Tree
 Christmas
 Thanksgiving

Submit Date

 Submit Date (Range)

First Name

 Last Name

Phone

 SSN

Address

City

 State

 Zip

Status	Date	Holiday	Last Name	First Name
Submitted	10/08/2017	Christmas	Ings	Brendan
Submitted	10/08/2017	Christmas	Johnson	Thomas

Generating the List

Once we enter the delivery window for the holiday program in question, as previously stated all the 'Submitted' referrals become 'No Value'. At this point the treasurers will want to generate a list of all those that need to be looked after during the holiday special works so they can receive holiday assistance.

Download CSV for Christmas 2017 at Conference South

Buttons: Back, Clear, Preview, Download

Filters: Submitted No Value Gift Received No Gift

Search: First Name [] Last Name []

Status	Visit Type	Referral Date	Referred By	Client	Spouse/Other	# Helped	Home#	Cell#	Address 1	Address 2
No Value	Home	10/08/2017	Beetle, Brad	Ings, Brendan		1	512-393-1121		551 Gelpi	
No Value	Home	10/08/2017	Baxter, Blaise	Johnson, Thomas		2	305-872-9444		3000 Brown St	
No Value	Home	10/08/2017	Baxter, Blaise	Thomas, John		1	305-777-6322		690 Gelpi	

The CSV that is generated by pressing the [Download] button has a long set of details - from phone numbers to address to the details related to the household members (name/age/gender). It also shows which caseworker made the referral. Conferences handle the distribution of who delivers the assistance differently. It might be that one conference will split this CSV up and ask the caseworkers who made the referrals to handle it. It may be divided by area. They may be given to non-vincentian volunteers to handle delivery and get back to you with details of who was helped and to what extent.

But at this point this process has now left CMS. The holiday event transpires - and the various records of what assistance was provided finds its way back to the treasurer.

Recording the Assistance

The treasurer now can simply work down the list of households that were on this list - selecting them one by one - and recording whatever assistance was provided.

Thanksgiving 2017 - john peterson

Buttons: Back, Update

Tabs: Thanksgiving, Client, Household, Other Holiday Referrals

Referral Date: 09/05/2017 Referred By: Baxter, Blaise

Status Date: 09/05/2017 Status: No Value

Comments: []

Please enter the gifts given to this client in the grid below.
After adding or removing gifts, use the "Submit" button to save the changes. The referral status will update accordingly.

R: Remove. Place a checkmark in this column and click "Submit" to remove a gift. If you remove all the gifts, the status will change to No Gift.

R	Resource*	Estimated Value	Description
<input type="checkbox"/>	Food	\$75.00	
<input type="checkbox"/>	Select		

Assistance items are entered individually and each can have their own note - so if a gift card were given out one could record what sort of gift card was involved etc. When finished press the [Update] button. This will alter the status of this holiday referral from 'No Value' to 'Gift Received'.

If the household did not receive assistance during the holiday event but were on the list, pressing [Update] where no assistance is attached will simply change the status of the holiday referral from 'No Value' to 'No Gift'.